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Sharing of Lessons Learned to create a future successful EHR implementation for YOU

Significance: Why did we develop lessons learned to improve future implementations?

UPMC Mercy is a 400+ level I trauma center. Migration to EHR required altering established workflows to ensure quality clinical documentation. Recognizing a lack of documentation on lessons learned from prior implementations, we embraced the opportunity to document our journey to support others.

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Purpose and Objectives

Purpose

Our purpose is to share lessons learned during UPMC Mercy's electronic health record (EHR) implementation that enhanced quality with electronic documentation while minimizing the impact on patient care delivery.

Objectives

- *Identify two tools to assist in a successful implementation*

- *Visualize the concepts presented for application at any facility to achieve success*

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Strategy and Implementation

Research: review documentation available as a road map for implementation that was used at other facilities.

Assemble: tools that are necessary for open communication and sharing of workflows, ideas and monitoring of progress

Create: a road map to success, facility specific education materials to minimize impact to patient care and establish a command center plan

Implement: establish clear implementation plans, test and retest, time and retime, correct any issues, practice and practice again

Go-Live: use the plan, formal evaluation of plan every shift, adjust as needed and continue to monitor throughout the implementation

Post go-live: debrief, review the entire implementation, document all challenges and successes, store for future access

Share: use what is learned to help other facilities successfully implement EHR

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Road Map for Success

1) Clear identification of the environment and scope of project with buy in from all levels of administration and staffing

2) Evaluation of existing computer systems and non automated processes with focus on direct patient care

3) Key resources to support project development from start to completion, including post go-live review

4) Timeline with milestones and assigned responsibilities for accountability

5) Documentation every step of the way for evaluation, education and support of future implementations

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Crucial Tools for Success

Share point site: (shared and secure access)

- Crucial in tracking the issues log and maintaining communication continuously throughout the implementation

- Password protected, secure access, part of share point for sensitive information

- A great tool to house information that will be used to assist other facilities

Communication tools:

- **Multi-disciplinary conference calls: (**decision makers**)** quick resolution, conference calls were held twice daily to identify issues and assign the responsible person for resolution of the issue

- **"Quick Tips":** electronic and paper copies of current issues and new processes for those rounding and educating.

- **Direct interaction:** debrief each rounder, gather written documentation of issues, administrative unit rounding and reporting, huddle at the change of each shift to review issues and educational opportunities

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Crucial Tools (continued)

Educational Materials:

• Unit/hospital specific educational materials, example; A day in the Life of the ICU nurse, with what they do from the start of their day and throughout their shift

• Electronic and paper version of reference materials available prior to the go live for the staff to be comfortable with the information

• Continually updated materials, distributed at designated times to address issues

• Unit based place for staff to practice on test patients prior to the go live

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Lessons Learned: What we encourage you to do better!

1) Training materials utilized were health system based and not "Mercy" specific. Materials had to be reworked during the go-live to provide better support to the staff.

2) A road map for staff or guide, linking documentation found in existing systems to where it could be located in the new EHR. (Where to go for what document)

3) In the early phases of the project and throughout implementation, user continuity or a tag team approach would have helped in developing a super user instead of frequently having to review plans for new meeting attendees.

4) Increase staffing on go-lives for all shifts to allow nurses to have smaller assignments to allow for the learning curve of the EHR

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Evaluation: Did sharing help others implementing EHR? *YES*

May 2010 UPMC Passavant went live with the UPMC Corporate Suite of Applications. They reviewed the lessons learned from UPMC Mercy's implementation and altered their strategies accordingly. Through direct observation, we witnessed a smoother transition for the staff using the system.

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Success with Sharing

Item	Mercy May 2009	Passavant 2010	Comment
Hospitals	1	2	
Cutover Steps	387	395	
Interfaces	199	204	
Go Live Issues	100	29	Fewer issues; lessons learned and experience payed off. Processes improved.
Help Desk Calls	3767	3192	575 fewer calls. More nursing support on units kept calls down.
Help Desk Support Shifts	280	165	
Nursing Support Shifts	697	797	More focus on direct end user support
Physician Support Shifts	83	44	Improved physician support model even though fewer rounding shifts. Concentrated and communicated direct physician support in the MD lounge. The "You come to us rather than we come to you" approach much more effective.

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Implications for Practice

0.7% of US hospitals have achieved HIMSS level 6 certification. UPMC Mercy reached this level in April.

Creation of the multi-disciplinary eRecord council provides a consistent group to evaluate the EHR process. A system group is also being formed so we can all share lessons.

Training materials were enhanced to support actual nursing practice providing the road map to success.

A shared site was developed for all facilities to contribute leading to a large reference base for any future implementations.

If you are implementing:

Talk to other facilities that are live, review what they have to offer, gain from their experience and document all you do…. Be successful and pass it on!

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